



## Chapter III: Outdoor Recreation Demand in Maine.

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### Key Understandings

Maine residents participate in outdoor recreation activities at an overall higher rate than both national and regional averages. Maine participation rates are especially high in nature-based activities.

Trends in outdoor recreation, identified through surveys, licenses, entrance figures, and other means show fluctuations across time and trends varying by type of activity and individual resources. While some sites and activities show declines in demand, outdoor recreation appears to continue to be a highly sought out Maine experience/lifestyle.

Participation in outdoor recreation activities (and demand for activities) is not one-size-fits-all. Age, place of residence, income, education, and a number of other factors influence participation in specific activities.

Maine has a relatively high proportion of non-resident participation in outdoor recreation activities. Maine State Parks, for example, report approximately 40% non-resident camper registrations. This high level of non-resident outdoor recreation has important recreation planning and economic implications.



## Introduction

*Participation in outdoor recreation, including both recent levels and trends across time, can be measured with a number of tools. In this report, participation is analyzed based on surveys, entrance figures, estimated visitor use data, registration figures (for power boats, snowmobiles, and ATVs), and license data. The combination of data is intended to provide a well-rounded view of outdoor recreation demand in Maine.*

*Furthermore, Maine is an outdoor recreation destination for the greater New England/Northeast region as well. Therefore, recreation trends across New England are very significant to understanding outdoor recreation demand in Maine. Given that campground reservations in Maine State Parks average around 40% non-resident campers and that other entities such as Baxter State Park (43% non-resident visitation in 2008<sup>1</sup>) and North Maine Woods (30% non-resident use from 1993-2006<sup>2</sup>) experience high levels of non-resident visitation, it is important that recreation planning reflect this reality.*

Source Notes: One major source of outdoor recreation participation used in this report is the Maine and Maine Market Region report (2009). This report uses survey data obtained as part of the National Survey on Recreation and the Environment, a national random telephone survey effort maintained by the US Forest Service. More detail on the survey can be found in Exhibit III C on page 23.

<sup>1</sup> Baxter State Park Annual Report 2008

<sup>2</sup> Governor's Task Force Regarding the Management of Public Lands and Publicly -Held Easements, (2008)

**Table 1: Most Popular and Fastest Growing Outdoor Recreation Activities in the U.S.**

National Survey on Recreation and the Environment (2008)	Outdoor Industry Foundation - Outdoor Recreation Participation Study (2006)
<b>Top 10 Activities - US Participants (millions)</b> <ol style="list-style-type: none"> <li>1. Walk for Pleasure (199.318)</li> <li>2. Family gathering (176.001)</li> <li>3. Gardening or landscaping for pleasure (157.965)</li> <li>4. View or photograph natural scenery (150.060)</li> <li>5. Visit nature centers, etc. (131.111)</li> <li>6. Attend outdoor sports events (123.666)</li> <li>7. View/photograph flowers &amp; trees (121.943)</li> <li>8. Sightseeing (121.099)</li> <li>9. Picnicking (120.796)</li> <li>10. Driving for pleasure (118.199)</li> </ol>	<b>Top 10 Activities - Total Number of Outings (Millions)</b> <ol style="list-style-type: none"> <li>1. Bicycling (3,123)</li> <li>2. Trail running (1,333)</li> <li>3. Fishing (1,082)</li> <li>4. Hiking (844)</li> <li>5. Camping (347)</li> <li>6. Paddlesports (canoe, raft, kayak (191)</li> <li>7. Bird Watching (188)</li> <li>8. Backpacking (81)</li> <li>9. Climbing (any type, with harness) (51)</li> <li>10. Cross-Country/Nordic Skiing (50)</li> </ol>
<b>Top 10 Fastest Growing Activities - % Change in Total Days (1999-2008)</b> <ol style="list-style-type: none"> <li>1. Visit farm or agric. setting (+100.2%)</li> <li>2. View/photograph flowers &amp; trees (+77.8%)</li> <li>3. View/photograph natural scenery (+60.5%)</li> <li>4. Driving off-road (+56.1%)</li> <li>5. View/photograph other wildlife (+46.9%)</li> <li>6. View/photograph birds (+37.6%)</li> <li>7. Kayaking (+29.4%)</li> <li>8. Visiting water (other than beach) (+28.1%)</li> <li>9. Backpacking (+24.0%)</li> <li>10. Snowboarding (+23.9%)</li> </ol>	<b>Rank Order (by Growth) of Activities - 1998 through 2005</b> <ol style="list-style-type: none"> <li>1. Telemark skiing (160.5%)</li> <li>2. Snowshoeing (83.4%)</li> <li>3. Trail running (22.1%)</li> <li>4. Canoeing* (8.5%)</li> <li>5. X-country skiing (6.6%)</li> <li>6. Rafting* (3.1%)</li> <li>7. Hiking (-0.1%)</li> <li>8. Bicycling (single-track dirt) (-1.4)</li> <li>9. Camping (any type) (-3.6%)</li> <li>10. Bicycling (any type) (-5.7%)</li> </ol> <p>*Kayaking was not measured in 1998.</p>
<b>Note: OIF surveys do not measure an identical set of activities compared to the NSRE survey. In general, OIF surveys track only the more physically active activities.</b>	

## **A. National Patterns of Outdoor Recreation Participation**

It is at the national level where there is the most disagreement about whether Americans are less or more active outdoors than in years past. On one hand, the National Survey on Recreation and the Environment data supports the argument that outdoor recreation is growing in the United States; the number of days of participation in outdoor recreation activities has risen 25% from 1999 to 2008 (Cordell, Betz, Green, and Mou, 2008). On the other hand, the Outdoor Industry Foundation(OIF) (2006) reports approximately a 2.5% drop in total U.S. outdoor recreation participation between 2001 and 2005 (a subsequent OIF report shows an uptick in participation in 2007). Additionally, researchers Pergams and Zaradic have asserted that per capita participation in outdoor recreation has been declining since 1987 (Pergams and Zaradic , 2008).

National data provides more than simply an overview of participation in general. **Table 1** on the previous page, comprised of data from both the NSRE survey and the OIF Participation Study, shows the most popular and fastest growing activities in the United States. The popularity and growth of viewing activities is especially noteworthy (in the NSRE data). Dr. H. Ken Cordell, a Pioneering Scientist and Project Leader with the US Forest Service, leads the National Survey on Recreation and the Environment, a national telephone survey effort aimed at monitoring outdoor recreation participation. In *Forest History Today* (Spring 2008), Dr. Cordell writes:

“The increase in the observation and study of nature is, in my view, a very healthy trend that apparently reflects rising and widespread interest in the future of natural resources, conservation, and public lands.” He goes on to add, "Of these top seventeen activities [out of 60 tracked], six involve viewing, photographing, identifying, visiting, or otherwise observing elements of nature—flowers, trees, natural scenery, birds, other wildlife, nature exhibits, and wilderness (wildlands generally). The growth in viewing and photographing plants and natural scenery has been most rapid, at about 78 and 60 percent, respectively" (Cordell, 2008).

The Outdoor Industry Foundation notes that that half

<b>Table 2: Fastest Growing Outdoor Recreation Activities in N.E. (1995-2009)</b>		
<i>Activity</i>	<i>% Change in # Participants</i>	<i>Increase in Participants (Millions)</i>
<b>Kayaking</b>	<b>2,656.9%</b>	<b>1.73</b>
<b>Handball/racquetball - outdoors</b>	<b>458.6%</b>	<b>2.17</b>
<b>Jet skiing</b>	<b>174.0%</b>	<b>0.54</b>
<b>Snowboarding</b>	<b>159.9%</b>	<b>0.52</b>
<b>Horseback riding</b>	<b>95.9%</b>	<b>0.35</b>
<b>View/photo fish</b>	<b>91.6%</b>	<b>1.51</b>
<b>Canoeing</b>	<b>86.0%</b>	<b>0.99</b>
<b>View wildlife (besides birds)</b>	<b>80.7%</b>	<b>2.71</b>
<b>Baseball</b>	<b>76.1%</b>	<b>0.49</b>
<b>Day hiking</b>	<b>75.4%</b>	<b>1.97</b>
<b>Source: NSRE Maine State Report data ('02-'09)</b>		

<b>Table 3: Outdoor Recreation Activities in N.E. with the Most Participants Added or Lost (1995-2009)</b>		
<i>Activity</i>	<i>Participants Gained (Millions)</i>	<i>Participants Lost (Millions)</i>
View wildlife (besides birds)	+2.71	-
Family gatherings outdoors	+2.46	-
Walk for pleasure	+2.44	-
Handball/racquetball outdoors	+2.17	-
Day hiking	+1.97	-
yard games (e.g. croquet, etc.)	+1.94	-
Kayaking	+1.73	-
View/photograph fish	+1.51	-
View/photograph birds	+1.44	-
Swimming in lakes and streams	+1.39	-
Running or jogging	-	-1.05
Softball	-	-.38
Ice skating outdoors	-	-.38
Volleyball outdoors	-	-.29
Downhill skiing	-	-.26
Anadromous fishing	-	-.13
Rowing	-	-.10
Waterskiing	-	-.10
Caving	-	-.10
<b>Source: NSRE Maine State Report data ('02-'09)</b>		

The ten fastest growing outdoor activities in New England are listed in **Table 2**. **Table 3** shows the activities with either the most participants gained or the most participants lost in New England from 1996-2009.

### **C. Maine's Non-resident Recreating Public**

Tourism is Maine's largest industry, producing \$10.1 billion in goods and services, \$425 million in tax revenue, and 140,000 jobs. Maine's natural resources and recreation opportunities are central to Maine's tourism industry.

of participants only get out once every other week (Outdoor Industry Foundation, 2008). Furthermore, the OIF report cites the diminishing participation rates associated with age. The NSRE data mirrors this finding.

National hunting and fishing trends show marginal declines, with the number of sportspersons and amount of time spent fishing or hunting showing small declines starting in 2001 (USFWS, 2006). However, "big-game hunting", according to NSRE data, has seen a 21.2% increase of days nationally between 2000 and 2007.

### **B. New England Trends**

#### ***Participation Rates***

The National Survey on Recreation and the Environment State Report produced for the 2009-2014 Maine SCORP examined activity trends in New England between 1995 and 2009. Both percent participating and number of estimated participants were recorded. Activities were clustered into "Nature-Based Land", "Viewing/Learning", "Developed-Setting", "Water", "Snow/Ice", "Outdoor Sports".

New England trends generally show increases in both percent participation and, as would then be expected, an increase in number of participants.

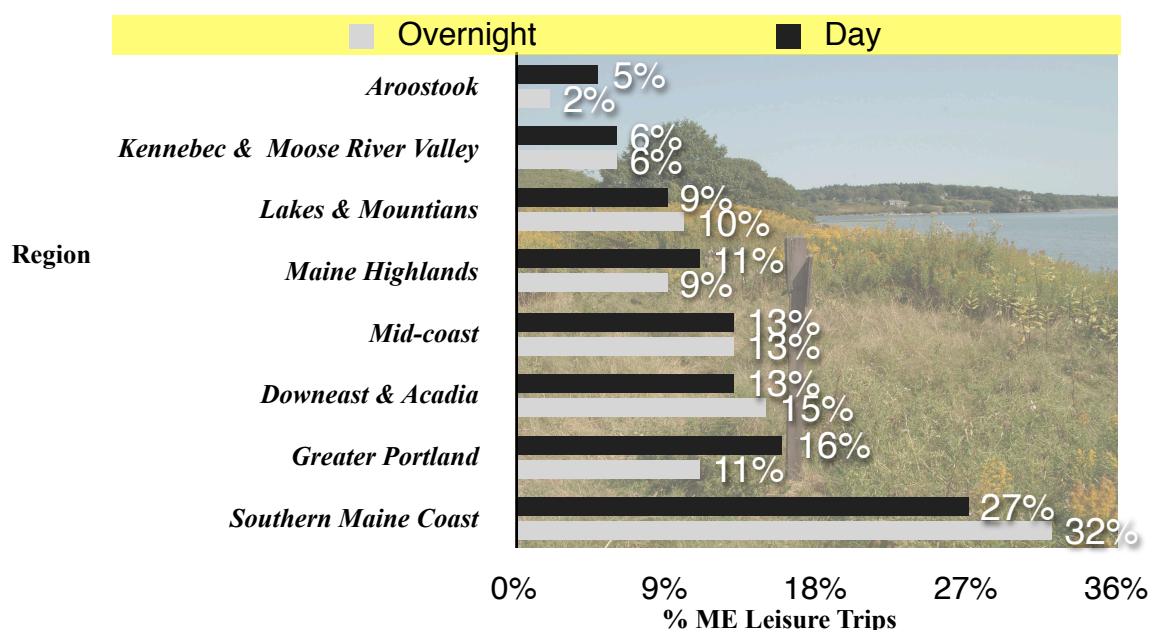
**Table 4: Residency of Maine Visitors (Includes In-state Trips)**

State(s) / Province	% Day Visitors	% Overnight Visitors
Maine	47%	6%
Massachusetts	23%	21%
New Hampshire & Vermont	14% (Mostly NH)	6%
New Brunswick & Nova Scotia	11.5% (Mostly NB)	6%
Quebec	4%	3%
Rhode Island & Connecticut	1%	9%
New York & New Jersey	-	27%
Pennsylvania	-	7%
Ontario	-	6%
Maryland, Delaware, DC	-	8%

Maine's Office of Tourism, through its contract with Davidson Peterson Associates, provides travel and tourism reports for the state on an annual basis that reflect samples of day and overnight visitors to Maine from US households. In 2008, there were an estimated 15.4 million overnight visitors and 16.5 million day visitors in Maine. Nonresidents made up 53% of day visitors and over 90% of overnight visitors. **Table 4** depicts the residency of overnight and day visitors in Maine. Massachusetts and New York residents make the most trips to visit Maine, though it should be noted that seasonal patterns such as relatively greater visitation from Pennsylvanians in summer and New Brunswick residents in winter do exist (Davidson Peterson Associates, 2009). Non-resident percentages for select destinations or activities (e.g., Maine State Parks, ATV registrations, etc.) are shown in **Table 5** (pg. 5).

Maine is organized into 8 tourism regions. A strong majority of tourist activity (approximately 70%) occurs in Maine's coastal regions. Still, tourism plays a major economic role across the state. **Figure 1** shows the percentages of tourism activity in Maine's tourism regions.

**Figure 1: Percent of Leisure Travelers Visiting Specific Maine Regions (2008).** Source: Davidson Peterson Associates/Maine Office of Tourism



<b>Table 5: Non-resident Percent Use/Visitation for Select Maine Outdoor Recreation Resources</b>		
<b>Destination or Activity</b>	<b>% Use or Visitation from Non-residents</b>	<b>Source</b>
Baxter State Park	43%	Whittin and Bissell (2008). <i>Baxter State Park Economic Impact Study</i> .
Maine State Parks	41.5%	Morris et al. (2006). <i>The Economic Contributions of Maine State Parks: A Survey of Visitor Characteristics, Perceptions and Spending</i> .
Maine ATV Registrations	14% (based on registrations)	Maine Department of Inland Fisheries & Wildlife (2008 Data)
Allagash Wilderness Waterway	A) 42% B) 47% (Camping Reservations)	A) Daigle (2005). <i>Allagash Wilderness Waterway Visitor Survey</i> B) 2007 Public Use Report - Maine Bureau of Parks & Lands
Maine Island Trail (Deer Isle Region)	72%	Ednie and Daigle (2007). <i>Maine Coastal Islands Visitor Survey 2006- Deer Isle/ Stonington Region</i> .
North Maine Woods Inc.	30%	North Maine Woods Data (2008)
Snowmobile Registrations	27%	Maine Department of Inland Fisheries & Wildlife (2008 Data)
Total Hunting & Fishing Licenses Sold	30%	Maine Department of Inland Fisheries & Wildlife (2006 Data)

In 2008, first-time overnight leisure travelers to Maine, according to Davidson Peterson Associates, were more likely to cite the natural beauty of the state as the reason for their visit than were repeat visitors. Furthermore, again according to Davidson Peterson Associates (2009), prospective visitors who have already been to Maine, rate the state higher than those who have not visited before. Thus, it can be said that natural attractions are a significant calling card drawing visitors - visitors who after coming to Maine, value what they experience.

<b>Table 6: Outdoor/Nature-based Tourism Requests (2008) (Courtesy Maine Office of Tourism)</b>	
<b>Request</b>	<b>Overall Rank (Including All Request Types Such as Shopping Etc.)</b>
Sightseeing	1
Beaches	2
Scenic Byways	3
Whales (watching)	4
Day Hiking	6
Foliage	9
Wildlife Photo	11
Guided Trips	13
Camping	16
Fishing	17
Canoeing	18
Kayaking	19
Whitewater Rafting	20
Birding	22
Sailing	23
Backpacking	24
Mountain Biking	25
Golf	26
Windjammers	27
Rock Climbing	28
Snowmobiling	29
Hunting	31
Downhill Skiing	32
X-Country Skiing	33
Snowshoeing	35
Sporting Camps	36



Outdoor recreation is listed as the primary purpose for between 18% and 23% (depending upon season) of all overnight leisure trips in Maine. Outdoor recreation is the primary purpose of between 9% (winter) and 24% (summer) of leisure day trips. It is noteworthy that Maine residents participating in an overnight leisure trip within Maine are more likely to primarily be traveling for outdoor recreation than their other New England and Canadian counterparts. It should also be noted that for overnight leisure trips, outdoor recreation is only second to "rest & relaxation" as the listed purpose of travel. "Rest & relaxation" (as well as the category of "cultural/heritage tourism, which was cited as a primary purpose at the 1%-3% level) certainly also has links to demand for facilities such as parks, open spaces, etc.

The Maine Office of Tourism also collects data in the form of information requests. **Table 6** lists those requests (ranked) for 2008. Two-thirds of the top 36 information requests involve outdoor recreation opportunities. 56% of information requests are for summer, 31% for fall, 3% for winter, and 10% for spring. Coastal counties account for a majority (upwards of 70%) of tourism in Maine.

### Visitor Attributes

Research conducted by Longwoods International (2007) showed overnight visitors average age to be 46 years old. A majority (60%) were married and a majority also had a household of no more than two members (59%). 67% had no children less than 18 years of age. 64% were employed full-time in manager/ professional jobs or other white-collar positions and 60% had incomes of greater than \$50,000. 59% were college graduates. 70% of the overnight marketable trips to Maine in 2001 were by people 35 years of age or older; more than 50% were by people 45 or older.

### Note

It bears mentioning that the Maine Office of Tourism transitioned from reports produced by Longwoods International to reports produced by Davidson Peterson Associates. Thus, reports differ some in content from 2006 to 2008. Additionally, visitor data cited in the 2003-2008 Maine SCORP differs in methodology from this SCORP; this SCORP document uses total annual trip figures that DO NOT count in-state day trips by Maine residents.

(Right): Landing a Brook Trout on the Roach River.



## **D. Maine Outdoor Recreation Participation**

**Activities - 2009 Participation Data** One take-home message from the 2009, NSRE-based *Maine and the Maine Market Region* report is that Maine residents participate in outdoor recreation at a level above the national and regional average. For instance, Maine has a higher percent participation rate than both the U.S. and New England rate in 61% of activities reported. Exhibit III 1, on pages 23 - 29 of this section, lists activity-specific participation nationally, in New England, and in Maine.

Activities in which Mainers participate at least 10 percentage points above both regional and national levels include:

- ◆“primitive camping”
- ◆“big-game hunting”
- ◆“snow/ice activities (any type)”, “snowmobiling”
- ◆“boating (any)”, “motorboating”, “canoeing”
- ◆“Coldwater fishing”
- ◆“View/photograph other wildlife (besides birds)”
- ◆“Gather mushrooms, berries, etc.”

### **Most Participated in Activities - Maine Residents**

NSRE data lists “walking for pleasure” as the outdoor recreation activity with the most Maine participants (942,000 Maine participants). “Walking for Pleasure” and all the other activities with over 50% participation by Maine residents are shown in **Table 7** on page 8.

### **Outdoor Recreation in Maine and Age**


Maine’s population is fast becoming one of the oldest in the nation. Furthermore, it is widely accepted that different age groups tend to engage in different activities at different levels of participation. Therefore, a look at recreation patterns associated with age is an important part of analyzing outdoor recreation in Maine.

Maine’s current activity participation data follows this trend of distinct patterns along an age continuum. Most generally, it can be said that Maine’s 55+ age population participates in outdoor recreation at lower levels than younger (under 55) Mainers. When looking at all activities measured in the *Maine and the Maine Market Region* report data, the 35-44 age group participates in the most activities.

As might be expected, age-based participation rates vary greatly from activity to activity. For example, **Figure 2** on page 9 shows the participation patterns in the “kayaking” and “view/photograph birds” activities across the age range of age groups (16-24, 25-34, 35-44, 45-54, 55-64, 64+). It also shows the percentage of the overall population within each grouping (red line). Of particular note is that in the “kayaking” activity, the two youngest age groups have participation rates well above their percentage of the population while the two oldest age groups participate in “kayaking” well below their percentage of the overall population. Conversely, the “view/photograph birds” activity participation rate for younger groups is low (below the relative percent of population), while the 65+ age group participates in the activity at a level higher than their percent of the population. In short, kayaking participation appears to be tilted towards younger participants whereas viewing and photographing birds appears to be more closely



**Table 7: Outdoor Recreation Activities with Over 50% Participation by Maine Residents**

<i>Activity</i>	<i># Resident Participants</i>	<i>% Residents Participating</i>	
Walk for pleasure	942,000	87.6	
Family gathering	863,000	80.3	
View/photograph natural scenery	786,000	73.1	
Swimming in lakes, streams, etc.	692,000	64.4	
Gardening or landscaping for pleasure	685,000	63.7	
Driving for pleasure	677,000	63.0	
View/photograph other wildlife	668,000	62.1	
Picnicking	663,000	61.7	
Attend outdoor sports events	649,000	60.4	
Sightseeing	648,000	60.3	
Boating (any type)	612,000	56.9	
Visit nature centers, zoos, etc.	607,000	56.5	
View/photograph wildflowers, trees, etc.	599,000	55.7	
Gather mushroom, berries, etc.	567,000	52.7	
Visit a beach	575,000	53.5	
Yard games (e.g., horseshoes)	539,000	50.1	

associated with older participants. A discussion of NSRE data specific to youths/young adults and seniors is included in the “Issues” section.

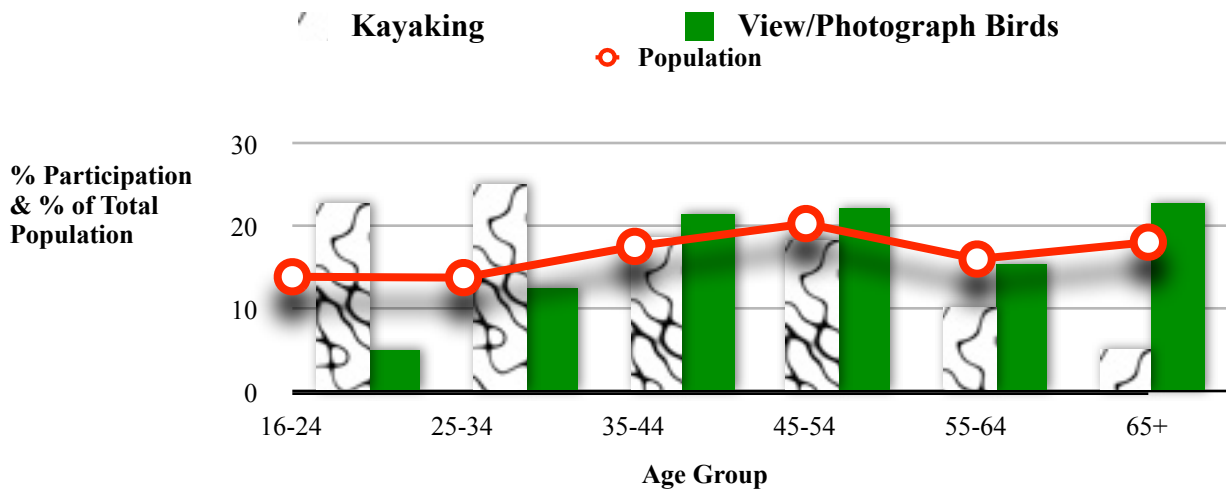
A more comprehensive examination of age group and activity characteristics is provided in **Figure 3** on page 9. This graph uses the activity clusters employed by NSRE researchers (“nature-based land”, “Water-Based”, etc.) to explore Maine participation rates by age. For a full listing of activities in each cluster, see **Table 8** (pg. 10). For more details on Maine outdoor

recreation participation in specific activities, see **Exhibit III-A** on page 23 of this chapter.

*Outdoor sports continue to be an important recreation opportunity for youth.*

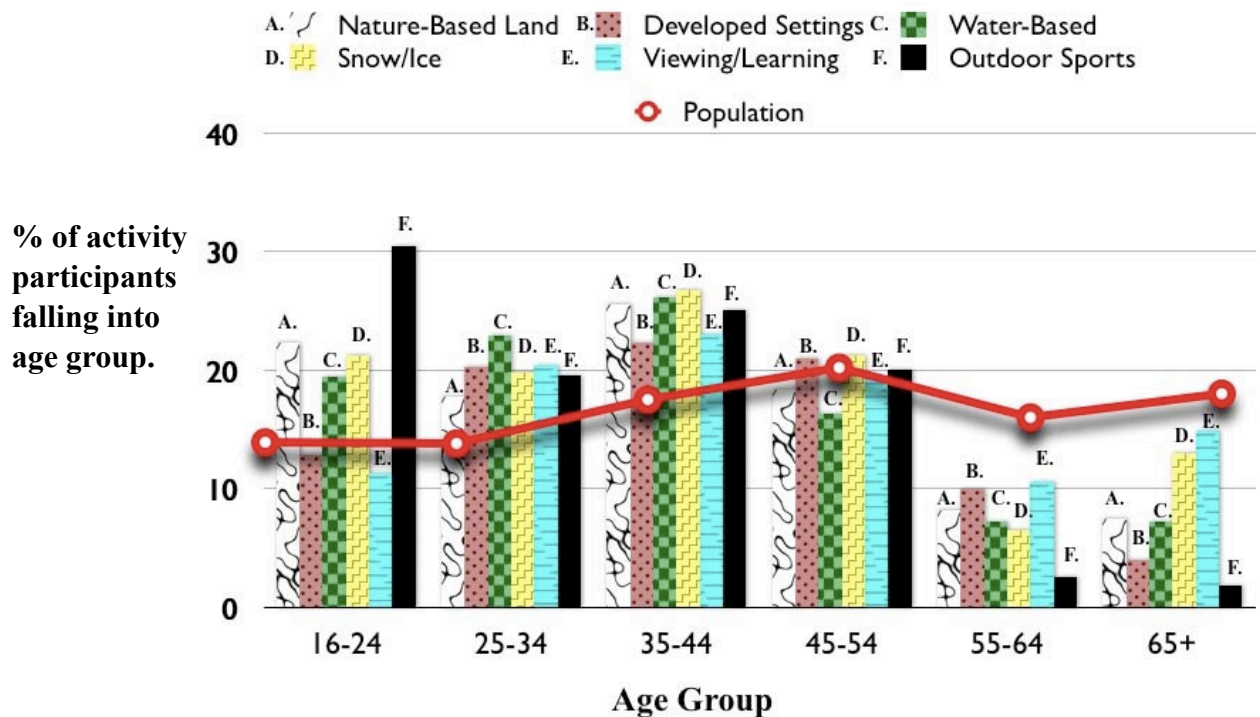


**Figure 2: “Kayaking” and “View/Photograph Birds” Activity Participation Rates and Maine Population Percents Across 6 Age Groups**



Note: Population (red line) is a Census estimate based on 2007 and representing the portion (percent) of the population falling into each age group.

**Figure 3: Maine outdoor recreation participation organized by activity clusters and age groupings. Note: population (red line) is a census estimate (2007) and represents the percent of the population falling into each age group.**



<b>Table 8: National Survey on Recreation and the Environment Activities Organized by Cluster</b>					
<b>Nature-Based Land Activities</b>	<b>Developed Land Setting Activities</b>	<b>Water-based Activities</b>	<b>Snow and Ice-based Activities</b>	<b>Viewing/Learning Activities</b>	<b>Outdoor Sports (Individual and Team)</b>
<ul style="list-style-type: none"> <li>• Visit a wilderness or primitive area</li> <li>• Day hiking</li> <li>• Visit a farm or agricultural setting</li> <li>• Developed camping</li> <li>• Mountain biking</li> <li>• Primitive camping</li> <li>• Drive off-road</li> <li>• Hunting (any type)</li> <li>• Backpacking</li> <li>• Big game hunting</li> <li>• Mountain climbing</li> <li>• Small Game hunting</li> <li>• Horseback riding on trails</li> <li>• Rock climbing</li> <li>• Orienteering</li> <li>• Migratory bird hunting</li> </ul>	<ul style="list-style-type: none"> <li>• Walk for pleasure</li> <li>• Family gathering</li> <li>• Gardening or landscaping for pleasure</li> <li>• Driving for pleasure</li> <li>• Picnicking</li> <li>• Yard games, e.g., horseshoes</li> <li>• Bicycling</li> <li>• Attend outdoor concerts, plays, etc.</li> <li>• Horseback riding (any type)</li> </ul>	<ul style="list-style-type: none"> <li>• Swimming in lakes, streams, etc.</li> <li>• Boating (any type)</li> <li>• Visit a beach</li> <li>• Swimming in an outdoor pool</li> <li>• Motorboating</li> <li>• Freshwater fishing</li> <li>• Visit other waterside (besides beach)</li> <li>• Canoeing</li> <li>• Coldwater fishing</li> <li>• Warmwater fishing</li> <li>• Kayaking</li> <li>• Saltwater fishing</li> <li>• Rafting</li> <li>• Rowing</li> <li>• Sailing</li> <li>• Waterskiing</li> <li>• Use personal watercraft</li> <li>• Anadromous fishing</li> <li>• Snorkeling</li> <li>• Scuba diving</li> <li>• Windsurfing</li> <li>• Surfing</li> </ul>	<ul style="list-style-type: none"> <li>• Snow/ice activities (any type)</li> <li>• Snowmobiling</li> <li>• Sledding</li> <li>• Snowshoeing</li> <li>• Cross country skiing</li> <li>• Downhill skiing</li> <li>• Ice skating outdoors</li> <li>• Ice fishing</li> <li>• Snowboarding</li> </ul>	<ul style="list-style-type: none"> <li>• View/ photograph natural scenery</li> <li>• View/ photograph other wildlife</li> <li>• Sightseeing</li> <li>• Visit nature centers, zoos, etc.</li> <li>• View/ photograph wildflowers, trees, etc.</li> <li>• Gather mushrooms, berries, etc.</li> <li>• Visit historic sites</li> <li>• View/ photograph birds</li> <li>• View/ photograph fish</li> <li>• Boat tours or excursions</li> <li>• Visit prehistoric archeological sites</li> <li>• Caving</li> </ul>	<ul style="list-style-type: none"> <li>• Running or jogging</li> <li>• Golf</li> <li>• Inline skating</li> <li>• Handball or racquetball outdoors</li> <li>• Tennis outdoors</li> <li>• Attend outdoor sports events</li> <li>• Softball</li> <li>• Basketball outdoors</li> <li>• Baseball</li> <li>• Soccer outdoors</li> <li>• Football</li> <li>• Volleyball outdoors</li> </ul>

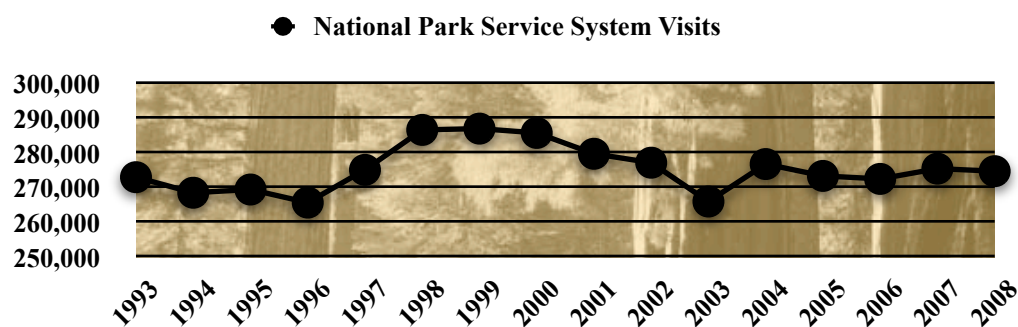


## **E. Recreation Trends-** **Visitation, Registration, and License Data**

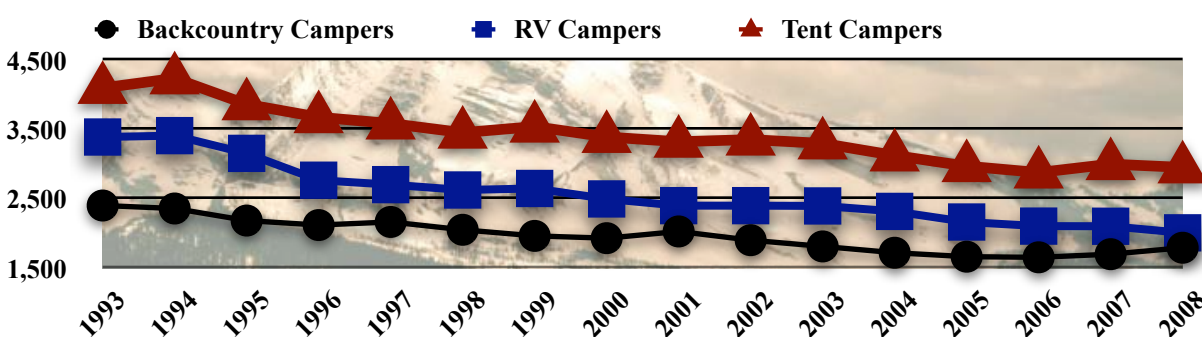
*It is important to recognize that a number of factors influence demand for outdoor recreation activities, both cumulatively and in patterns specific to individual activities. Weather, economic conditions, evolving patterns of work and life, as well as demographic changes all have the potential to influence outdoor recreation demand and participation. With this in mind, the following sets of data showing quantifiable recreation visits or license/registration data is intended to help inform an understanding of where recreation demand is trending.*

**US National Park Service (NPS)** Visitation to parks and public lands is a useful gauge of demand for many types of outdoor recreation (notably nature-based recreation). It is possible to look at national level trends to get a “big picture” view of visitation trends. In this light, **Figure 4** shows the trend in visitation to properties administered by the **U.S. National Park Service**. Over the last 15 years, there has been fluctuation in visitation across the National Parks. However, the last five years have been more constant, with total National Park Service recreation visits hovering around 275 million per year. National Park Service camping trends (**Figure 5**) show an overall reduction in stays for RV camping, tent camping (campgrounds) and backcountry camping. From the overall 15 year high experienced in 1994, 2008 levels have dropped approximately 24% for backcountry camping, 30% for tent (campground) camping, and 41% for RV camping. Recent data points towards growth in NPS visits coming from parks

**Figure 4: Visitation to US National Parks, (in Thousands) 1993-2008**

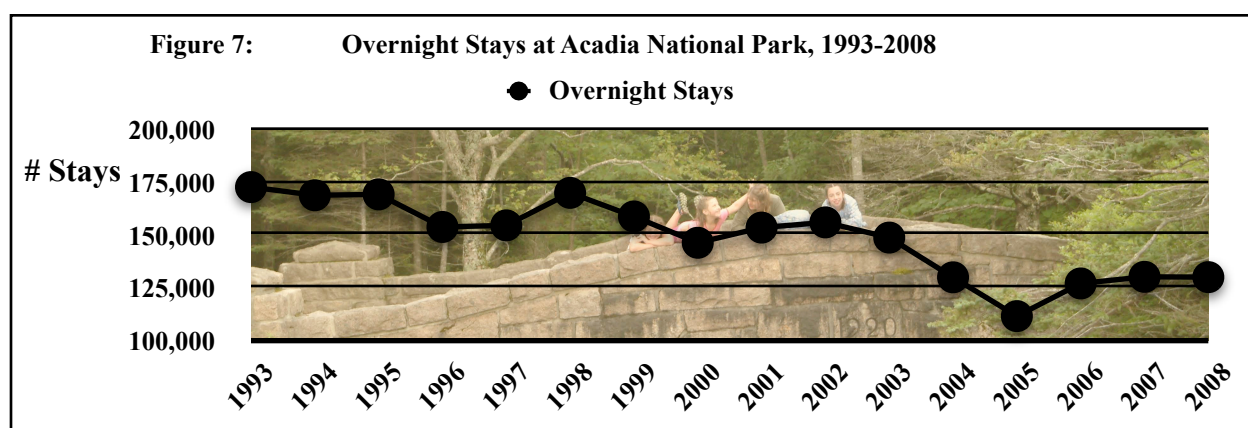
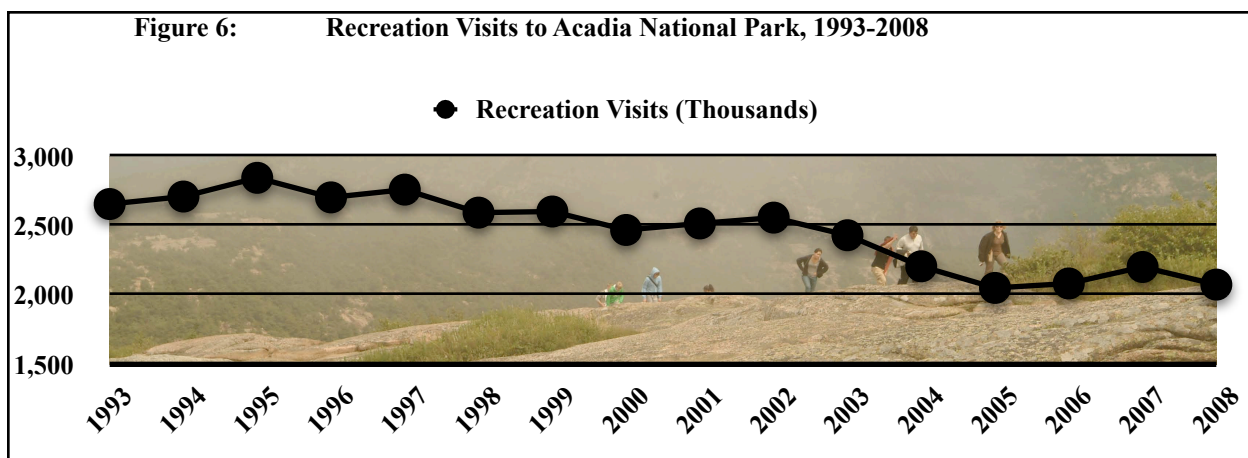


**Figure 5: Camping Figures (in Thousands) for US National Park Service, 1993-2008**



situated in urban, suburban, outlying and mixed population areas (versus more rural, remote sites) (Outdoor Industry Foundation, 2009).

**Acadia National Park**, Maine's iconic National Park, has more recently experienced reduced visitation compared to the period of the mid and late 1990s. As **Figure 6** shows, Acadia NP saw a significant drop in visitation starting in 1995 and bottoming out in 2005. Recent trends show



an uptick in visitation, followed by a small dip in 2008 ( a year with poor summer weather).

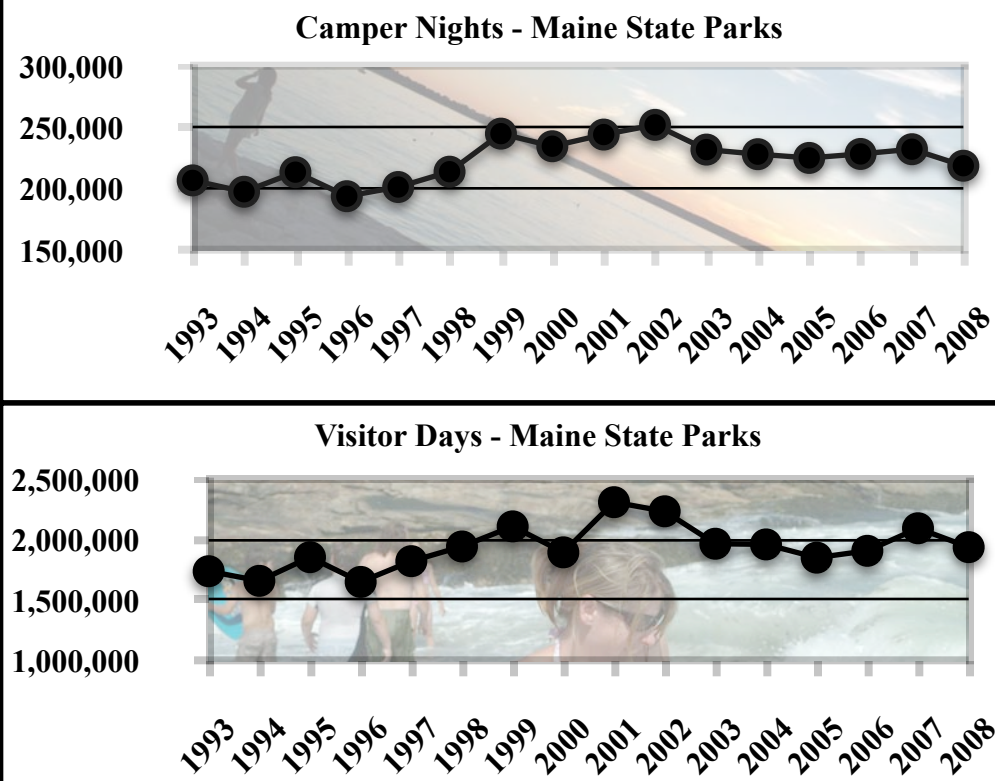
**Figure 6** shows camping trends at Acadia, which have for the most part mirrored overall park visitation patterns.

### ***State and Other Non-Federal Parks and Lands in Maine***

At the state level, there are several sources of visitor use figures. One major source of insight is visitor use at **Maine State Parks**. As with a variety of outdoor recreation managers, Maine's State Parks saw a reduction in visitation between the early 2000s time frame and the mid 2000s. However, the dip in visitor days between the 2001/2002 peak and the 2005/2006 valley (approximately 17%) is not as pronounced as some other recreation agencies experienced.

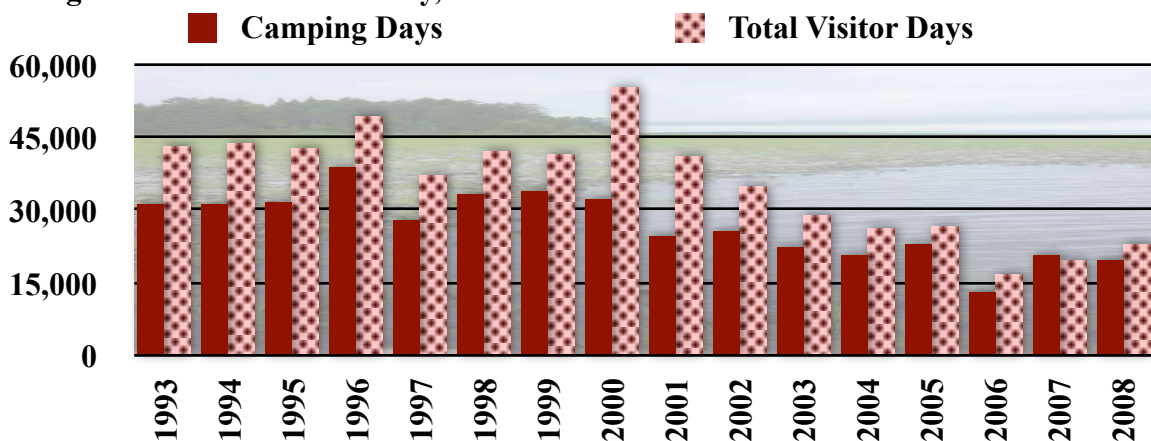
**Figure 8** (pg 12) shows both camper nights (overnight use) and visitor days (day use) figures for Maine State Parks and Historic Sites from 1993-2008.

**Figure 8: Camper Nights and Visitor Days at Maine State Parks 1993-2008**



*The Allagash Wilderness Waterway and the Penobscot River Corridor*, both waterways managed by the Maine Bureau of Parks and Lands, show noticeable trends in remote river-based recreation. In both cases, the overall trend since the mid to late 1990s has been generally reduced visitation. Trends for both waterways can be seen in **figures 9 & 10**.

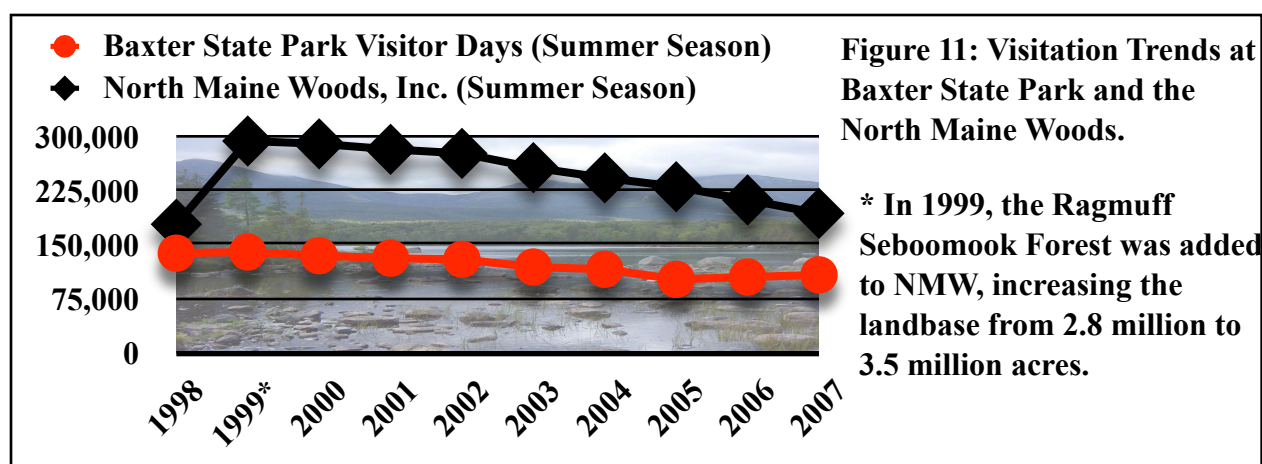
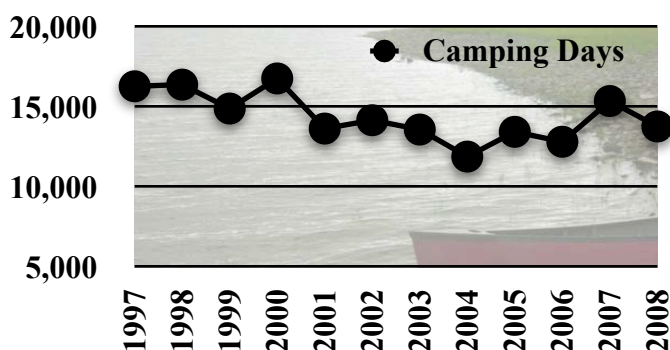
**Figure 9: Camping Days and Total Visitor Days at the Allagash Wilderness Waterway, 1993-2008**



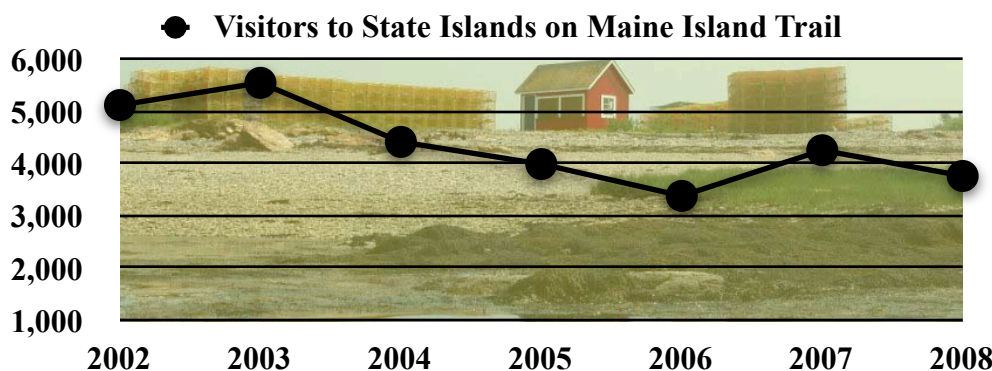


**Baxter State Park (BSP)**, a 204,733 acres wilderness park operated under the guidance of a Governing Authority (Maine Attorney General, Maine Commissioner of Inland Fisheries and Wildlife, and Director of the Maine Forest Service), is separate from Maine's Bureau of Parks and Lands. BSP, given its predominantly gated access and camping reservation system, has accurate data for trend analysis.

**Figure 10: Camping Day at the Penobscot River Corridor, 1997-2008**



**Figure 12: Recreation Visitors to BPL Islands on Maine Island Trail, 2002-2008**



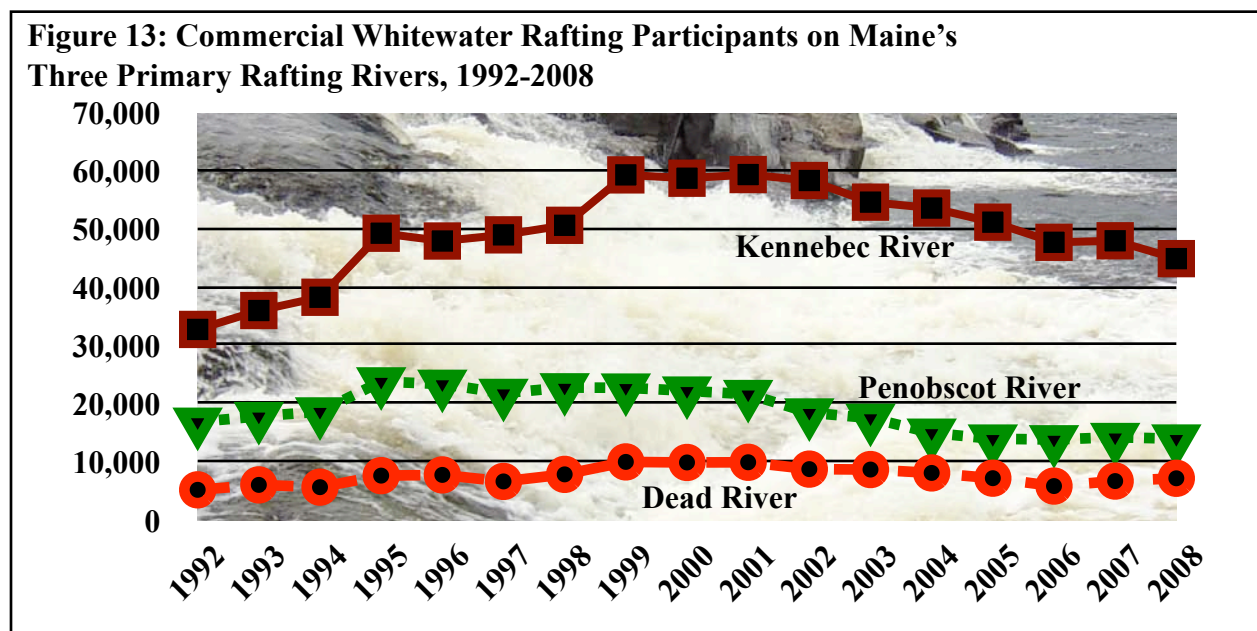
Note: during this same time period, private islands added to the trail increased significantly, thus reducing the reliance on publicly owned islands.

As with Baxter State Park, **North Maine Woods Inc. (NMW)**, a group of corporations, individuals, families, public agencies, and non-profit landowners, also has an insightful collection of visitation records. The gated entry system to this 3.5 million plus- acre landbase

enables NMW recreation managers to measure recreation use year to year. **Figure 11** shows that visitation has diminished at both Baxter State Park and the North Maine Woods system.

The *Maine Island Trail Association (MITA)* is a 501(c)3 non-profit organization dedicated to sustaining volunteer stewardship and recreation management of coastal islands along a 350-mile waterway extending from Cape Porpoise Harbor, Kennebunkport, on the western Maine coast, to Washington County on the east. It was established 1993 and includes over 150 islands and mainland sites along the route, available for day visits or overnight, low-impact camping. MITA, in conjunction with the Maine Bureau of Parks and Lands, manages 47 coastal islands along the trail. MITA estimates visitation to MITA managed islands. **Figure 12** shows trends in Maine Island Trail use.

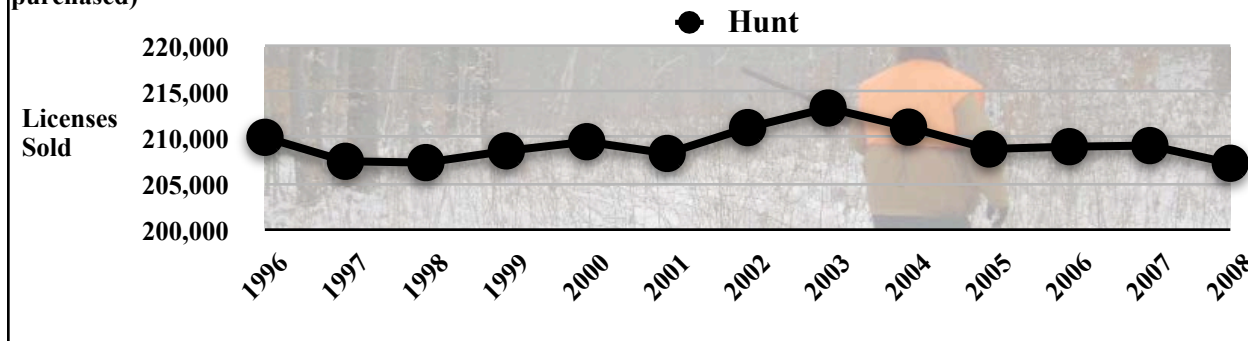
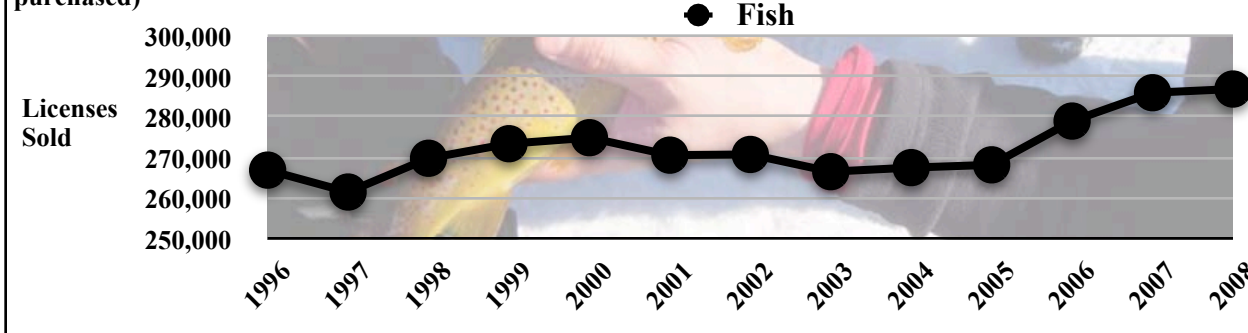
*Commercial whitewater rafting* is regulated by the Maine Department of Inland Fisheries and Wildlife. **Figure 13** shows recent use trends on Maine's three primary rafting rivers. Like some of the visitation figures, whitewater rafting figures show a downturn from an approximate turn of the century peak.



### *Hunting & Fishing - License Trends*

Maine's Department of Inland Fisheries and Wildlife regulates hunting, freshwater fishing, and trapping in Maine. The hunting and fishing data obtained through analysis of licenses serves as a source of data for understanding the participation in and demand for hunting and fishing in Maine. The *National Survey of Fishing, Hunting, and Wildlife-Associated Recreation*, published by the US Fish and Wildlife Service, is also a source of insight regarding hunting and fishing in Maine.

Trends over the last decade show Maine's level of participation in hunting and fishing remaining fairly steady, though license sales (see **Figure 14 and 15**) do show undulations over

**Figure 14: Total Hunting Licenses Sold by Year (Resident & Non-Resident, includes all license types purchased)****Figure 15: Total Fishing Licenses Sold by Year (Resident & Non-Resident, includes all license types purchased)**

recent years. Likewise, data from the *National Survey of Fishing, Hunting, and Wildlife-Associated Recreation* (2006) shows no appreciable change in the number of hunters or anglers in Maine (both resident and non-resident).

**Table 9** uses *National Survey of Fishing, Hunting, and Wildlife-Associated Recreation* figures to summarize hunting and fishing activities for Maine in 2006. It is also perhaps relevant to note that the same report shows 25% of Maine residents participate in hunting and/or angling (vs. 15% US rate).

**Figure 14** shows hunting license trends since the mid 1990s. Echoing the USFWS *National Survey of Fishing, Hunting, and Wildlife-Associated Recreation* report, Maine hunting license sales data doesn't show dramatic change in hunting participation. **Figure 15** reflects recent, modest growth in fishing licenses sold. **Table 9** provides a snapshot of hunting and fishing in Maine.

**Table 9: Selected Maine Attributes from the National Survey of Fishing, Hunting, and Wildlife-Associated Recreation (USFWS)**

Hunting	Fishing
146,000 resident hunters	220,000 resident anglers
14 hunting days/hunter (average)	17 fishing days/angler (average)
29,000 nonresident hunters (10 days/hunter average)	131,000 nonresident anglers (8 days/angler average)
89% of resident hunters live in a rural area.	79% of resident anglers live in a rural area.



## Motorized Recreation

Registrations for snowmobiles, all-terrain vehicles (ATVs), and motor boats provide recreation planners with information pertaining to trends in the activities relying on those machines. There is an assumption that individuals registering snowmobiles, ATVs, or boats intend to use them and the registrations are an appropriate proxy for popularity (demand). All registration data within this report comes from the Maine Department of Inland Fisheries and Wildlife, which collects registration data.

<b>Table 10: ATV, Snowmobile, and Boat Registration Figures 1993-2008</b>			
<b>Year</b>	<b>ATV</b>	<b>Snowmobile</b>	<b>Boat</b>
1993	21,447	64,985	113,590
1994	22,390	70,043	115,123
1995	23,857	71,306	115,895
1996	24,324	76,821	127,905
1997	27,270	77,754	133,529
1998	28,834	84,205	126,665
1999	33,854	81,935	129,226
2000	40,279	86,501	128,601
2001	44,796	97,835	128,202
2002	46,141	95,395	126,850
2003	59,857	107,285	128,228
2004	66,023	92,633	128,307
2005	62,774	102,802	128,202
2006	62,268	75,235	129,028
2007	63,355	89,940	128,023
2008	67,013	102,449	123,894

Motorized outdoor recreation in Maine, based on registrations, shows growth over the last 15 years. For instance, ATV registrations grew rapidly in the late 1990s through the 2003-2004 timeframe, when registrations started to plateau. **Figure 16** (pg. 18) depicts the growth in Maine ATV registrations, and **Table 10** (left) shows the same data in tabular form. Participation data from the *Maine and the Maine Market Region* report lists 26.8% of Maine residents as having driven off-road for pleasure. It should be noted that this includes not only ATVs but 4x4 Jeeps and trucks as well as dirt bikes.

The rapid growth of ATV sales and use preceding creation of the 2003-2008 Maine SCORP led to “The ATV Issue” being listed as an implementation priority. As the 2003 Maine SCORP states, “an issue of overwhelming statewide concern that was raised in several groups was the impact of the tremendous growth in ATV use in Maine. Illegal or inappropriate use of All Terrain Vehicles is resulting in user conflicts and social problems on certain trails, causing environmental damage, leading to the closure of private lands to public recreational use, and

can impede the acquisition of certain high-priority open space and recreational lands by government agencies and nongovernmental organizations”. Additional study grew out of this issue, and the result was that in 2005, The University of Maine’s Margaret Chase Smith Policy Center published *Economic Contributions of ATV-Related Activities in Maine* (2005). This study estimated that \$156.0 million was spent in the 2003/2004 season to purchase, register, and operate ATVs (spending for accessories, clothing, lodging, gas, etc. was included in analysis).

The report also included data reflecting rider and use characteristics. Select rider and use characteristics findings are summarized in **Table 10**.

Snowmobile registrations (**Figure 17**) have also increased over the last decade. In that same time, however, volatility in registrations have increased as well. In the 2003/2004 winter season, registrations fell 14%. The next season, registrations rose 11%. The following winter (2005/2006), registrations fell 27%. Registrations have shown an uptick in the last two seasons.

Motor boat registrations, including everything from small outboard motors for canoes to large pleasure craft, do not show any dramatic change over the past decade. As **Figure 18** shows, registrations have held steady in recent years.

It should be noted that registrations are not the only source of data relating to motorboat use. For example, the *Maine and the Maine Market Region* lists 38% of Maine residents and 27% of New England residents participating in “motorboating”. Additionally, the *Economic Contributions of Maine State Parks* (2006) reports 3% of state park visitors bringing a power boat with them to a state park or historic site.

### In Focus- Snowmobilers

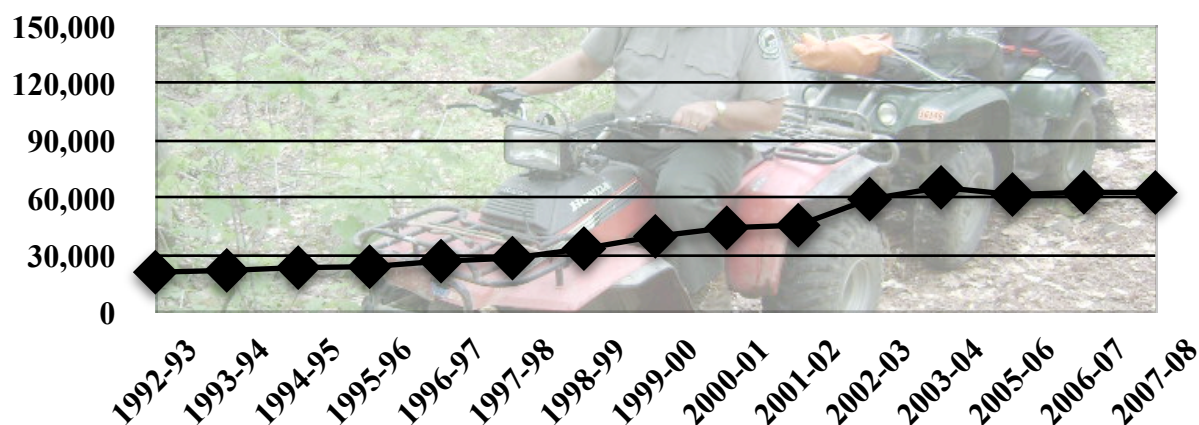
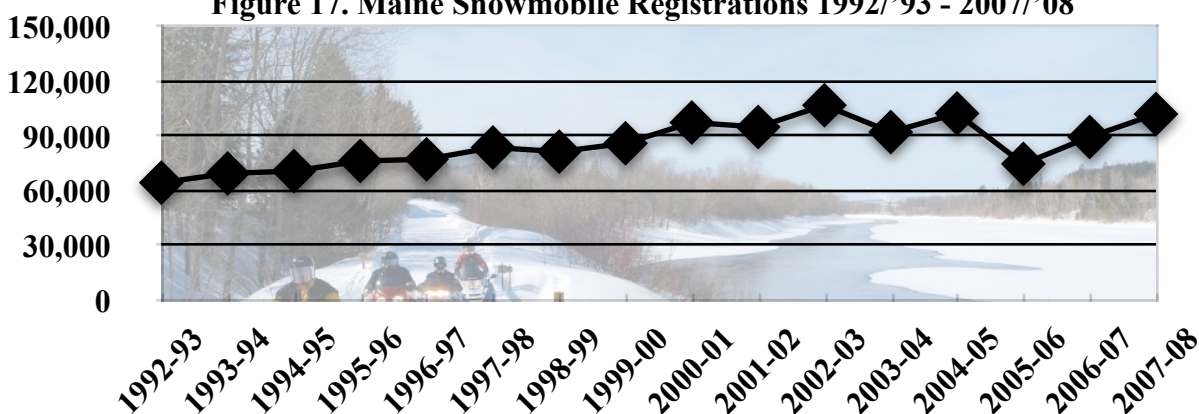
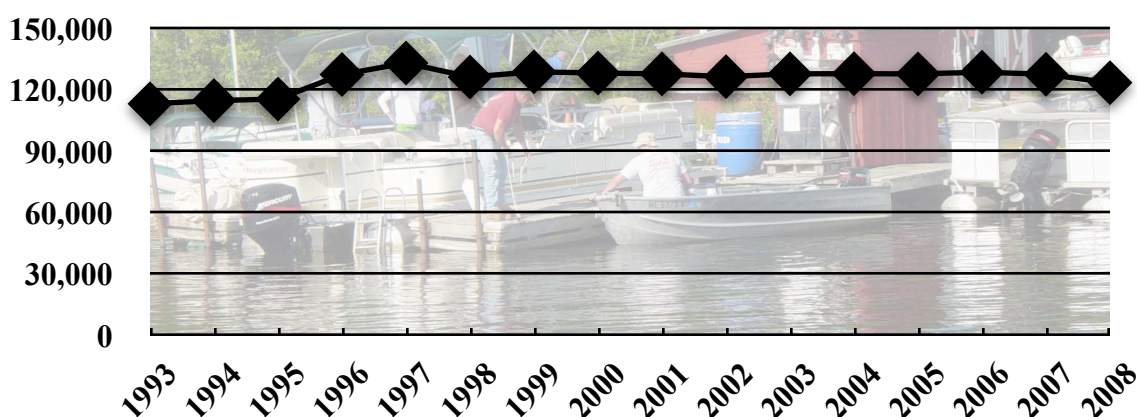
Essentially all snowmobilers in Maine are white, and 62.5% are male. Overall, 28.7% of Mainers over the age of 15 participate in at least one snowmobile ride per year (many, of course, ride much more). 68.7% of all snowmobilers over the age of 15 are between 15 and 44 years old. Only 16.5% of snowmobilers are 55 years old or older.



The largest income segment that snowmobilers fall into is the \$25,000 - \$49,000 family income range (41.2% of Maine participants). In New England, the income profile for snowmobilers is slightly higher than in Maine.

In 2008, 26% of registrations belonged to non-resident snowmobilers. Snowmobile registrations, like many other outdoor recreation and tourism figures, are impacted

by weather. For instance, the winter of 2006, a year marked by overall poor snow conditions, saw a 27% drop in nonresident registrations from 2005. However, the next season (2007) saw a 10% increase followed by a 37% increase for 2008. Most recently, in 2008, Maine saw 99,245 resident snowmobiles registered and 26,541 nonresident snowmobiles registered.

**Figure 16. Maine ATV Registrations 1992/'93 - 2007/'08****Figure 17. Maine Snowmobile Registrations 1992/'93 - 2007/'08****Figure 18. Maine Motorboat Registrations 1993-2008**

**Figures 17-18** (above) depict registration trends for ATVs, snowmobiles, and motorboats in Maine from the early 1990s to 2006. It should be noted that in '03/'04, non-resident ATV riders were first required to register.



## State and National Perspectives on Off-Highway Vehicle (OHV) Recreation

The *Internet Research Information Series*, a collaborative effort between the USDA Forest Service's Southern Research Station and its Forestry Sciences Laboratory in Athens,

Georgia; the University of Georgia in Athens; and the University of Tennessee in Knoxville, Tennessee, produced a 2008 report entitled, *Off-Highway Vehicle Recreation in the United States and its Regions and States: An Update National Report from the National Survey on Recreation and the Environment (NSRE)*.

Excerpted discussion points are provided below. Though speaking at a national level, the sentiments expressed reflect issues of importance here in Maine.

### ATV Riding Characteristics Findings (Source: 2005 *Economic Contributions of ATV-Related Activities in Maine Study*)

Respondents rode an average of 520 miles/year in 2003/2004.

Riders with higher yearly riding totals were more likely to be members of an ATV club and to have taken a safety course. 21% of riders have ever been members of an ATV club.

Per capita ATV ownership was greatest in Franklin, Piscataquis, and Washington Counties. The Maine Highlands tourism region ranked as the largest riding location (35% of state riding)

1/3 of respondents have been riding for more than 15 years. 1/3 have been riding for less than 5 years.

Summer and fall seasons account for over 75% of all riding.

Over 65% of riding occurred on private land (including 31.9% on rider's own land). 15.1% of riding occurred on land of unknown ownership (i.e., rider did not know ownership).

78.4% of respondents rode at least some on private lands. Respondents reported riding at least some on state lands (38.9%), some on national or local lands (20.6%), and on unknown ownership (49.3%).

Respondents riding more miles/year reported riding more on marked ATV trails than did respondents riding less miles.

Nearly 2/3 of respondents took at least one overnight trip.

The top 5 factors influencing where to ride include, in order: courteous riders, scenery, interconnected trails, good signage, and a variety of terrain.

•“Despite a recent dip in OHV sales, most likely related to increasing gas prices and ownership saturation, OHV's still remain very popular. In particular, ATV sales account for more than 70 percent of the OHV market. There are approximately 44 million people, aged 16 years or older, who presently participate in OHV recreation. One-in-five Americans participated one or more times in OHV recreation within the past year. This interest in OHV recreation, overall, represents about an 18 percent increase in the number of OHV participants between 1999 and 2007. Population growth will most likely result in more OHV users in the future”.

•“Increasing urban and ex-urban sprawl and loss of open private lands will be important in the future OHV participants seek to gain access to our public lands, such as national forests, for OHV recreation. Public land managers will not only be faced with increasing pressure from the numbers of OHV participants, but also additional demands for related services and facilities”.

## The Case for Trails



According to NSRE data:

- ◆87.6% of Mainers walk for pleasure
- ◆27.7% run or jog
- ◆41.3% hike
- ◆38.2% bike
- ◆14.4% cross-country ski
- ◆16.7% snowshoe
- ◆28.7% snowmobile
- ◆26.7% drive off road.

The same data shows day hiking, driving off-road, backpacking, horseback riding, snowmobiling, cross-country skiing, and walking for pleasure as significantly growing activities (1995 vs. 2009). Perhaps it should not be surprising, then, that trails are viewed as an economic asset. *Trails are now viewed as the number one amenity influencing home-buyers over the age of 55 (Morton and Lindahl, 2008).*

## In Focus: Mountain Bikers

27% of the Maine NSRE sample responded that they participate in mountain biking, leading to an estimate of 298,000 mountain bikers. Maine mountain bikers are 55.7 % male, are almost entirely white (caucasian), trend towards the middle of income scales, and are just as likely to live in metro (more urban) counties as non-metro (more rural) counties. Over 40 % of participants are under the age of 34. Mountain bikers have a diversity of educational attainment. At the time of this report, Maine has 3 local chapters of the New England Mt. Bike Association (Mt. Agamenticus Chapter in southern Maine, Central Maine Chapter in the greater Augusta area, and the Midcoast Chapter in the Camden region).

[Right]: Mountain bikers peddle towards Sugarloaf Mt., Maine's highest ski peak. (Photo Courtesy Ellen Wells).



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